



Fact Sheet: 2008 Filing Season VITA/TCE

□ What is VITA/TCE?

- **Volunteer Income Tax Assistance (VITA)** and **Tax Counseling for the Elderly (TCE)** are two volunteer programs providing free help to low-income, senior, disabled, and non-English speaking persons who need to file simple federal and state tax returns.
- Many military bases also provide VITA services for the US Armed Forces. In 2007 there were 38 **Military VITA** sites throughout California.
- In addition to income tax returns, many VITA sites also provide free assistance in the preparation of California Homeowner and Renter Assistance (HRA) claims.
- In California, the major TCE partner is the American Association of Retired Persons (AARP).
- There are approximately 1,100 sites statewide providing free tax assistance.

□ Who can use VITA?

- VITA provides free, easily accessible assistance to individuals who may have limited income (generally \$40,000 and below), are non-English speaking, or are disabled.

□ Who can use TCE?

- TCE provides free, easily accessible tax assistance specifically targeting the needs of the elderly.

□ How many people do VITA and TCE assist?

- Income tax return statistics for the 2006/2007 time period:
 - 4,393 volunteers statewide
 - 1,085 sites
 - 169,000 income tax returns (85% were filed electronically)

- HRA statistics for the 2006/2007 time period:
 - 1,032 volunteers statewide
 - 618 sites
 - 86,897 HRA claims
 - 400,000 people assisted
- ❑ **How do IRS and FTB support the VITA and TCE programs?**
 - IRS and FTB administer the programs jointly.
 - IRS and FTB recruit VITA and TCE volunteers statewide.
 - IRS and FTB provide training to the volunteers.
 - IRS and FTB provide outreach to let the public know about the program.
 - IRS and FTB also provide training and support for tax law questions to the Military VITA program.
- ❑ **What is FTB doing to increase awareness of the VITA and TCE programs?**
 - Recruit more volunteers statewide to increase the program's availability at existing sites.
 - Recruit more volunteers from the ranks of tax professionals, non-English speaking members of the community, college students, and government employees.
 - Work with IRS to increase the number of volunteer sites to better reach individuals in their own neighborhood.
 - Publicize the program statewide to ensure that the citizens most in need of this service know about it and where to go for help.
- ❑ **Find out more about the VITA or TCE programs**
 - Visit the FTB website at www.ftb.ca.gov to learn more about VITA and TCE.
 - Visit the IRS website at www.irs.gov to learn more about VITA and TCE.
 - Visit the AARP website at www.aarp.org to learn more about the TCE program.
- ❑ **Contact**
 - Franchise Tax Board
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